It takes a well thought out succession plan to keep a business in the family

The vast majority of U.S. businesses are family-owned—yet only about one-third of them survive into the second generation. Having a documented business succession plan in place can make all the difference. A Morgan Stanley Smith Barney Financial Advisor can help work with you to develop a business succession plan that helps to protect the business assets and ensure a smooth transition to the next generation and beyond.

Please join us at our informative seminar, "Business Succession Planning," which will examine these and other important topics:

- Common concerns and goals of business owners
- Planning and operational needs of a business
- Common business structures
- Factors in developing a successful business succession plan

Date: Tuesday, February 9, 2010
Time: 6:00 P.M.
Place: Morgan Stanley World Headquarters, Executive Dining Room, 41st Floor
1585 Broadway, New York, NY 10036 (Entrance on 47th Street)

Guest Speakers: Richard Bloom, CPA, PFS, Rothstein Kass & Company, PC
Neil J. Tendler, CPA, CFP, PFS, Rothstein Kass & Company, PC
Principal in Charge of Family Office Services
Howard M. Rubin, Esq., Managing Partner – Goetz Fitzpatrick, LLP

Please call Oscar Cantu today at 212-903-7692 to make your reservation.
Admission is free, but seating is limited.

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Neil Tendler, CPA, PFS, CFP

Neil Tendler is a tax principal at Rothstein Kass, based in the Firm's Roseland (NJ) office. Neil specializes in tax matters affecting high-net-worth individuals, such as business owners, executives, and hedge fund managers. He provides tax consulting, income and estate tax planning, federal, state and local tax compliance services, and representation before federal and state tax authorities. He also works with clients on multi-generational tax planning, philanthropic planning, wealth preservation strategies, and risk management.

Prior to joining Rothstein Kass, Neil honed his wealth planning expertise through his senior executive positions at two prominent family office advisory firms. He also has over 20 years of Big Four experience including 17 years at KPMG, LLP, where he served as Partner-in-Charge of Personal Financial Planning for the Northeast and Mid-Atlantic regions.

Neil received a Bachelor of Science degree in Accounting from SUNY Albany and a Master of Science degree in Taxation from Pace University. He is a certified public accountant in New York and New Jersey, a personal financial specialist, and a certified financial planner. Neil is a member of the New York State Society of Certified Public Accountants (NYSSCPA) and the American Institute of Certified Public Accountants (AICPA). He is an active supporter of the Muscular Dystrophy Association.

Richard Bloom, CPA, PFS, MST

Richard Bloom joined Rothstein Kass in July, 2009 and is based in the Firm's Roseland (NJ) office. Richard specializes in personal tax and financial planning matters affecting high net worth individuals, such as closely held business owners, executives, and hedge fund managers. He provides tax consulting; income and estate tax planning; federal, state and local tax compliance services; and representation before federal and state tax authorities for such individuals. He also works with clients on multi-generational tax planning, philanthropic planning, wealth preservation strategies, and risk management.

Prior to joining Rothstein Kass, Richard honed his wealth planning expertise through his senior executive positions at two prominent family office advisory firms. He also has over 17 years of Big Four experience at KPMG, LLP where he served in the Personal Financial Planning division and select subgroups.

Richard received a Bachelor of Science degree in Accounting from the University of Delaware and a Master of Science degree in Taxation from Seton Hall University. He is a certified public accountant in New Jersey and a personal financial specialist. Richard is a member of the New York Jersey Society of Certified Public Accountants and the American Institute of Certified Public Accountants (AICPA) including the personal fincial planning section of the AICPA. He is an active supporter of the Memorial Sloan Kettering Cancer Center.

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